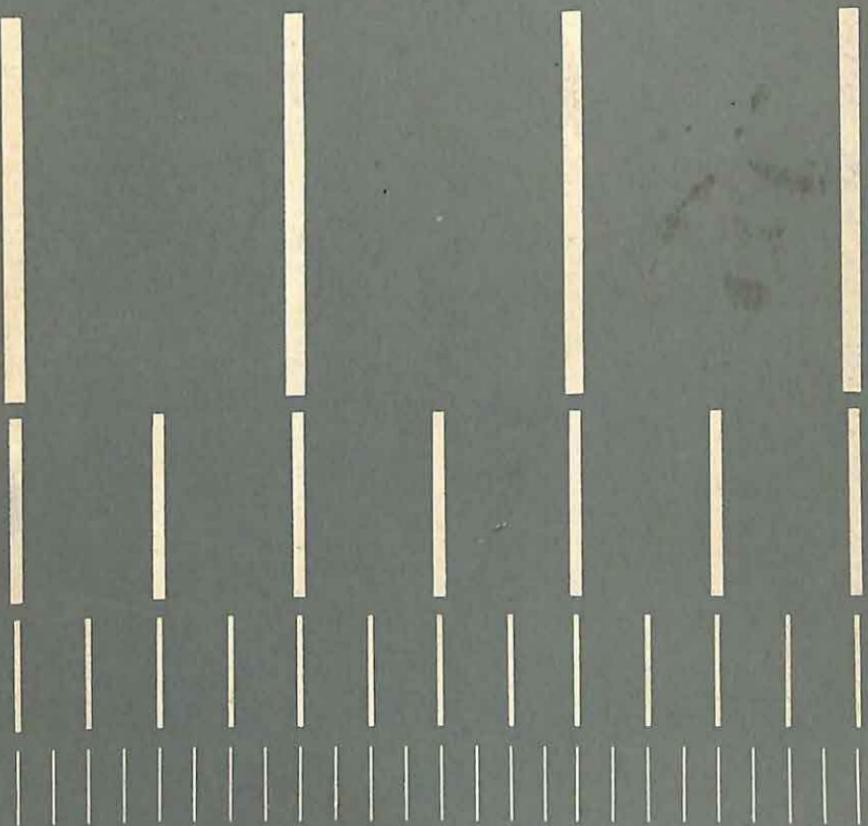
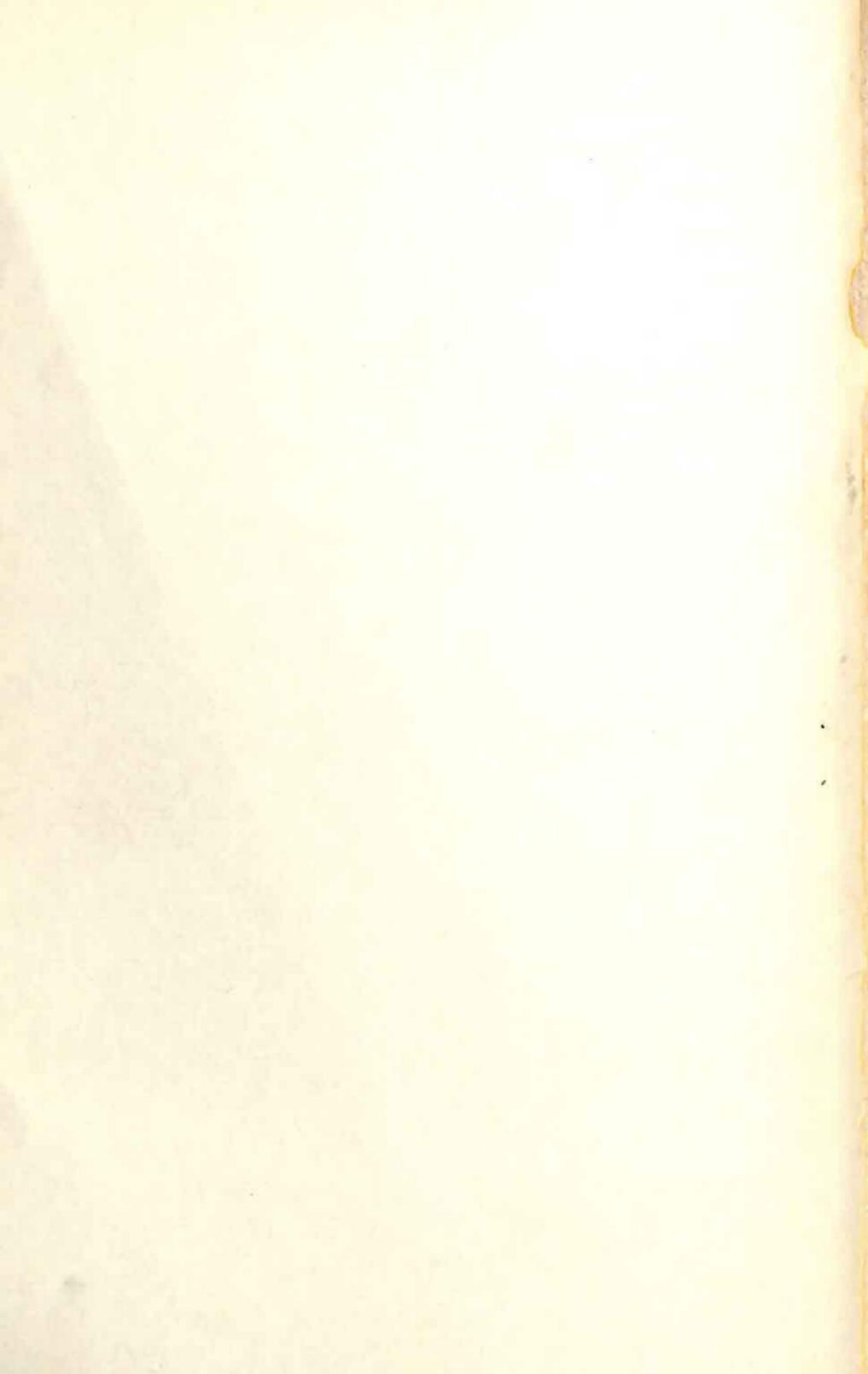


The social context of educational planning

C. A. Anderson





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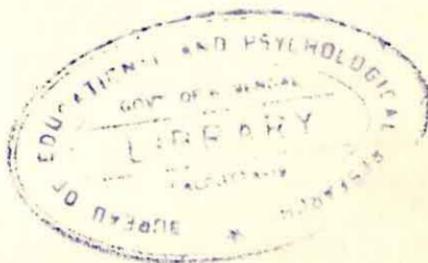
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The social context of educational planning

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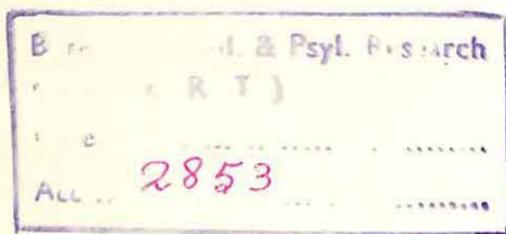
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Fundamentals of educational planning

The booklets in this series are written primarily for two groups: those engaged in—or preparing for—educational planning and administration, especially in developing countries; and others, less specialized, such as senior government officials and civic leaders, who seek a more general understanding of educational planning and of how it can be of help to over-all national development. They are devised to be of use either for self study or in formal training programmes.

The modern conception of educational planning has attracted specialists from many disciplines. Each of them tends to see planning rather differently. The purpose of some of the booklets is to help these people explain their particular points of view to one another and to the younger men and women who are being trained to replace them some day. But behind this diversity there is a new and growing unity. Specialists and administrators in developing countries are coming to accept certain basic principles and practices that owe something to the separate disciplines but are yet a unique contribution to knowledge by a body of pioneers who have had to attack together educational problems more urgent and difficult than any the world had ever known. So other booklets in the series represent this common experience, and provide in short compass some of the best available ideas and experience concerning selected aspects of educational planning.

Since readers will vary so widely in their backgrounds, the authors have been given the difficult task of introducing their subjects from the beginning, explaining technical terms that may be commonplace to some but a mystery to others, and yet adhering to scholarly standards and never writing down to their readers, who, except in some

particular speciality, are in no sense unsophisticated. This approach has the advantage that it makes the booklets intelligible to the general reader.

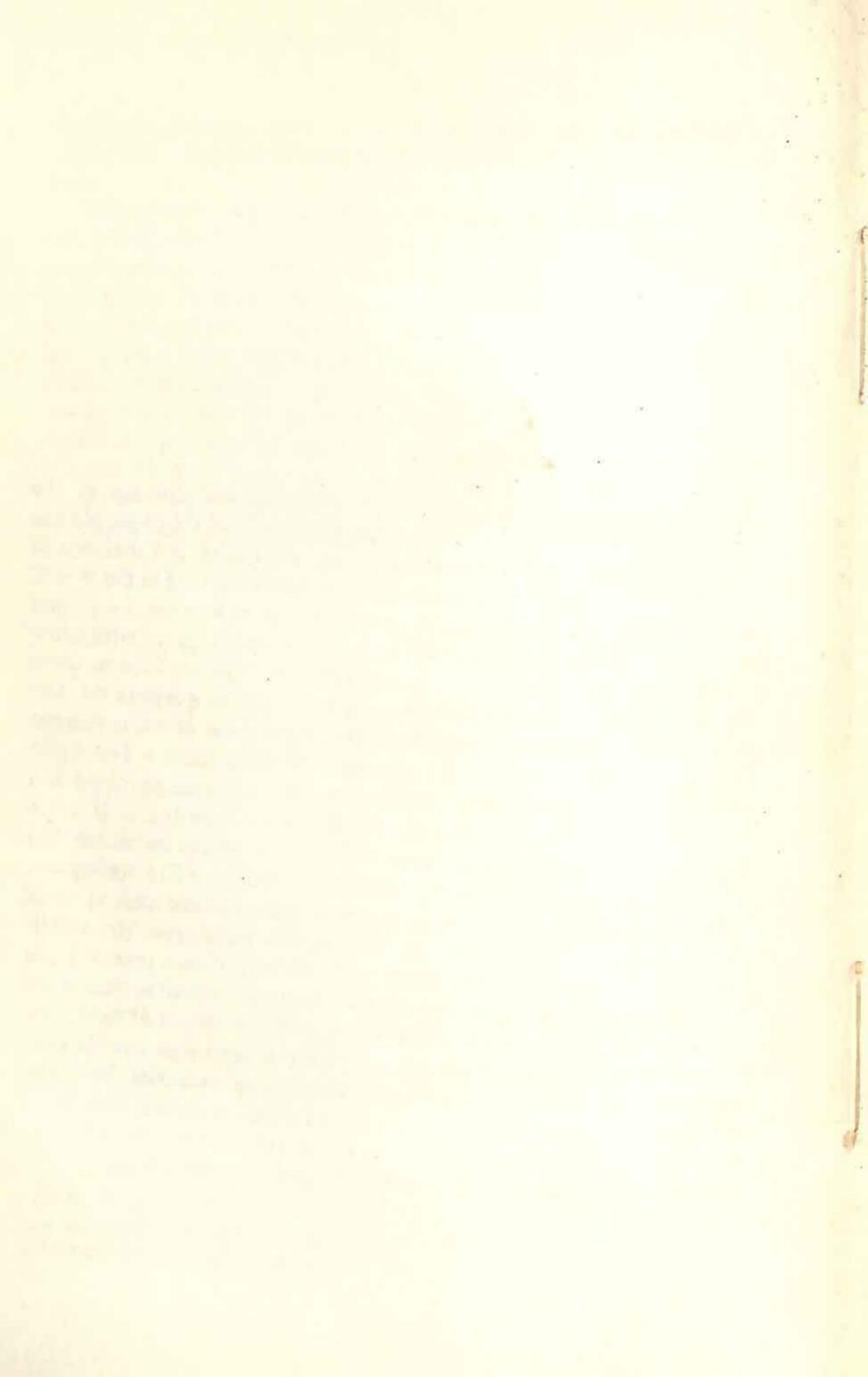
Although the series, under the general editorship of Dr. C. E. Beeby, has been planned on a definite pattern, no attempt has been made to avoid differences, or even contradictions, in the views expressed by the authors. It would be premature, in the Institute's view, to lay down a neat and tidy official doctrine in this new and rapidly evolving field of knowledge and practice. Thus, while the views are the responsibility of the authors, and may not always be shared by Unesco or the Institute, they are believed to warrant attention in the international market-place of ideas. In short, this seems the appropriate moment to make visible a cross-section of the opinions of authorities whose combined experience covers many disciplines and a high proportion of the countries of the world.

Foreword

C. Arnold Anderson is professor of sociology and director of the Comparative Education Center of the University of Chicago. He has acted as a consultant to Unesco on many occasions, is a member of the IIEP's Council of Consultant Fellows, and took part in the World Bank mission to Kenya. He is the author of numerous books and papers on educational planning and on the sociology of education.

'The purpose of this work', says the author, 'has not been to question the utility of educational planning but rather to question the way it is usually done and to emphasize the importance of many societal factors usually ignored by the planners.' Starting from a firm belief in the need for educational planning, he challenges assumptions and easy generalizations on which practice has often been based. It is too much to expect everyone to agree with all the points he makes, but no one who is interested in the relations of the school to society can read this booklet without being driven to take a closer look at some of his own cherished assumptions. Writing as a sociologist, Mr. Anderson sets out the limits within which he thinks educational planning can be effective, and the limits also to the use of the school system as an instrument of economic and social change. His treatment of these contentious themes will be of particular interest to those who already have some acquaintance with planning in developing countries, but, read in conjunction with other booklets in this series, it should also be of value to the layman who wants to know more about the interplay of theory and practice in this new and rapidly growing field.

C. E. BEEBY
Center for Studies in Education and
Development, Harvard University



Introduction

Difficulties in educational planning result in large part from exaggerated expectations of what schools can be expected to contribute to national development. High expectations for social benefits from formal education have some common social and intellectual roots with the ideology of formal social planning and reliance upon planning as a technique for social engineering. The expectations persist because too little attention is paid to the complex ways in which schools are connected with the other institutional structures in actual societies. Much the same criticism of educational planning results, moreover, from a rigorous scrutiny on economic grounds of the manpower aspects of education.

In this very brief discussion of some of the sociological limitations on educational planning, conclusions based on more complete analyses are set down briefly and with few supporting illustrations.

Seven topics have been singled out for emphasis:

- Ambiguities in the conceptualization of educational planning
- The multifunctionality of formal education
- Effective training for occupational goals
- Socio-political constraints on educational planning
- Issues of equity and quality
- Schools as instruments for value reorientation
- The social context of education determines its effect.

Ambiguities in the conceptualization of educational planning

The following definition of planning (marking off the logically distinct aspects) is borrowed from Dror: 'The process of preparing / a set of decisions / for action in the future / directed at achieving goals . . .'¹

There are certain key elements in this or related definitions: (a) there is orientation to the future; (b) the focus is on action (rather than, for example, on acquiring knowledge); (c) in that something is being designed, there is deliberative endeavour; by implication, (d) there is interdependence among a set of interlocked decisions; and (e) within this bounded realm of decision, consistency is sought among the elements; finally (f) there is, inescapably, a need to allocate scarce resources among various possible combinations of actions (i. e., costs are always involved).

Planning can be thorough and astute even though implementation of the plans is very poorly done. Obviously a competent planner will allow for probable inefficiencies or tardiness by the agencies responsible for implementation; a plan made without considering such probabilities would hardly deserve the name. Yet to regard implementation as integral with planning confuses the latter with the operation of the educational system. Accordingly, the search for criteria of decision and for congruence among the action-oriented decision factors should be emphasized. Planning is not writing recipes for specific actions. Implicitly, then, one ambiguity has already been stated: confusion of planning with implementation. Certain others will be mentioned briefly, for they are discussed later.

There can be incompatibility between fitting the outputs of schools to manpower aims and striving for social benefits from schooling when both aims are to be embraced within one integral plan—especially when it is also to form part of a more comprehensive plan. One can view educational planning as a component of general economic planning or education can be taken as a separate focus of planning, and in the latter case the goals can be as manifold as the functions education is expected to perform. As should be apparent, one cannot arrange an educational plan for social ends that would

1. Y. Dror 'The Planning Process', *International Review of Administrative Sciences*, Brussels, Vol. 29, No. 1, 1963, p. 51.

also be fitted neatly to such quantitatively elaborated targets as those of manpower planning.

A third ambiguity arises out of the multifunctional character of education. Though many would have schools prepare people for certain specific tasks (as embodied in occupational skills), schools will and must bring about many other kinds of changes in pupils, such as building flexibility in responding to new opportunities. Sometimes an effort is made to escape this dilemma by restricting educational planning to setting outputs by levels only (so many secondary graduates) with only the broadest of specialities on each level. But while this view of the problem may actually lead to the ultimate productivity goals of the planners, it is not consistent with specific schedules of skills to meet manpower targets.

Once definite manpower expectations for a nation's school system are set aside there is a tendency to talk in very broad terms. Thus schools are expected to be adapted to the local society, yet to transform that society into a more developed one. Schools, like other agencies in the society, however, will foster (or at least not uproot) many undesired characteristics in their products; for example, schools encourage individuals to escape from the drudgery of farming and of menial labour—whether or not there are jobs for them. A society must put up with many such undesired outcomes once it puts its faith in formal education, and neither indoctrination of pupils nor manipulation of curricula will dramatically change those outcomes. National leaders hope that modernization will be accompanied by an increase in the proportion of citizens who know how to adapt to new conditions. Schools alone cannot create that kind of men unless other social policies create opportunities and incentives for many individuals to plan for themselves within the broad framework of national goals. But such goals for schools are too broad to be aligned with definite manpower plans; it is virtually impossible for such plans to be converted into specific requirements for schools or courses of study.

One cannot derive definite educational programmes from a set of economic aims for a nation. Only in very broad terms is the adapting of schooling to forecasted jobs the task of the educational system. That responsibility, rather, lies with the employing agencies. It is easier to work out new ways of combining diverse skills, or skills with material resources, than to repeatedly reconstruct a school system. In broad terms one can specify more science, less language,

and so on. In actuality, most statements of national needs for this or that kind of skill are highly unreliable and misleading as regards their implications for specific educational programmes. Moreover, most translations of such needs into specific school plans entail inconsistent specifications for the work of pupils. But even if school work could be more closely tailored to economic specifications, nations would be disappointed because the creation as well as the utilization of human resources depends upon 'know-how'—a quality little fostered in even the best school systems.

The multifunctionality of formal education

In many discussions, even when not in mathematical terms, education is treated as a parameter in an abstract equation. The more common practice, of course, is to narrow education to manpower terms—with a polite bow to its social results. One can have only compassion for leaders of new nations who seek desperately to break the vicious circle of poverty; much of the oversimplification in expectations about education stems from anxiety to obtain rapid development. Looking at real pupils in actual class-rooms we get a more heartening but also a more chastening conception of what schools can do for pupils. Educational planning will remain imprecise just because economic statistics 'capture' few of the capabilities that youth acquire from school. Yet, however indirectly, each of the following functions of schools contributes to economic development.

1. Schools always do play some part in preparing individuals to earn a living and to participate in an evolving occupational structure. They do more to identify who will be eligible for particular occupations than to give specialized preparation for performing in them. General education is the principal preparation for employment, mainly through equipping individuals to absorb specific training.
2. Everywhere schools help introduce the child to his society's culture and they widen his participation from local to national bounds. Most important among these common features—and of increasing importance as technological advance becomes a salient national purpose—are the local variants of the three R's. In much of the world today children must learn new language and number systems and science for which there is no precedent in their parents' lives.

These competencies are as important for knitting a society into a polity as in readying individuals for mechanized production or for accepting the cues to new behaviour mediated by print. In the process schools always indoctrinate pupils, but more important is their widening of children's comprehension of novel situations. Indoctrination may include specific political ideologies, but even the least tendentious stories supply new views.

3. Schools also create individuality. They set the person apart in some or many respects from the culture of most of his fellow citizens. The child learns to explore new worlds imaginatively and to think about and react to new situations and objects. In this process he acquires new loyalties to various groups and ideals. He becomes acquainted with new human models with which to identify. By no means least, children develop new conceptions of their own identity and of their potentialities. They accept new rules of conduct. They acquire confidence for entering into new kinds of experience, often very private ones. Pupils discover that they can cope with intellectual tasks, discovering that there are objective standards of what is correct apart from personal preference. He who learns to see himself in these new ways becomes the more productive worker and the more responsible citizen. Any view of educational planning that does not seek these boons from schooling is myopic.
4. Schools, jointly with other agencies, select and mould the élites who will carry the heaviest responsibilities, local and national. The selecting is more important than the identifying, for few can achieve high positions aided only by school lessons. A modernizing society generates a lengthening roster of roles of varying difficulty and prestige; selecting or identifying persons for different strata of positions and allocating men among the specialities on each level require participation by schools. Therein, of course, lie issues about equal opportunity and fairness.
5. Finally, much of what goes on in schools is designed to perpetuate and improve the educational system itself, to preserve old and introduce new intellectual systems. The schools do this by identifying and producing competence to persist to higher levels of school and by cycling personnel back into the expanding system as teachers. In its higher reaches this cultural function of the schools creates and supports a national 'high culture' and the competence to share in a world culture, whether of diplomacy or

of science. Schools in an advancing society are continually making the competence of previous cohorts of pupils obsolete. Through absorbing new cognitive maps of the world and new affective responses toward both old and new, youth are enabled to acquire the material and non-material marks of modernization.

Most of us would like to believe that a certain increase in the percentage of youth finishing secondary school will be accompanied by a definite increase in national income. But such correlations always turn out to be loose and ambiguous, in part because of this multifunctionality of formal (or non-formal) education. These functions must be seen as supportive of and supported by the social milieu surrounding the schools, a milieu that is also inducing similar or complementary attitudes and skills in people. The school's role in the creation of alert and enterprising individuals is essential yet also only modest. Hence we ask not what is the contribution of education to development but in what ways does education become knit into development processes? The school can be a powerful influence when it is surrounded by a 'development milieu'.

Now it is a simple matter of fact that in all societies individuals' schooling, occupations, and incomes are only moderately correlated—except at the extremes of the occupational scale. Many individuals have certificates from a school but learned little beyond rote lessons; others with less or no formal schooling have by other means become enterprising persons. In part, of course, this situation reflects the fact that some individuals have greater native ability. But also some individuals acquire more of one and others more of another of the various outcomes of schooling.

It is the multifunctionality of schooling that makes the usual specifications for developmental education so unhelpful. One reads that schools should have a 'balanced' curriculum—yet what each pupil learns is quite unbalanced. Education, so it is said, should be adjusted to the needs of the developing society; the curriculum should transmit specifically those skills and attitudes needed to transform the society in the prescribed direction. But when one steps outside the manpower framework—itself of illusory definiteness—one can find no clear consensus on what national needs are. Even if we could, we cannot specify what particular lessons or methods of teaching would arouse in pupils specifically those needed capacities. One pupil will be drowsy except in the lessons that interest him. The grinding pedant may become an accurate laboratory tech-

nician; the dunce becomes a prospering trader. Schools affect different pupils in bewildering ways. Neat formulas for what schools should accomplish and predictions of how much the growing cadre of secondary graduates will contribute to gross national product are often nullified by events.

Pupils' learning can be sufficiently balanced if the curriculum is diversified and if classes are stimulating. Schools will be adjusted to their society if alert graduates are turned out. One could not prevent schools from being in large measure adjusted or accommodated to the surrounding society, but they need not be wholly so. If the culture is stagnant and hostile to the wished-for technological society, 'unadapted' schools are more likely to lead pupils to become alienated from traditions and receptive to novelty. Certainly also, miserably staffed schools will bring few pupils except the most brilliant or rebellious to new aspirations for their lives. The norm of 'adapted' has little utility for evaluating schools; as often as otherwise it would mean adapting them not to the culture of the pupils' parents but to a way of life that is barely envisaged by a few national leaders. And few schools in so sluggish a society will leave much mark on their pupils' lives unless those lives are also being moved in new directions by other progressive influences around them.

Effective training for occupational goals

Any country that can put a growing proportion of its people to work in productive jobs will have a rising *per capita* income. Unfortunately, training men for new kinds of work does not put them to work. Nor does it bring either the more subtle capabilities for productive work or the non-human factors of production into existence. The most frustrating handicap of under-developed countries is that they lack the resources with which to train a labour force or the men who will know how to use those who are trained. Effective training and useful employment presuppose experienced instructors and a core of men already busy in the new kinds of production. Even when places for use of new skills are at hand, however, there remains the question of the most suitable places in which to provide training.

Several conditions must be met if a country is to have an adequate supply of trained labour. These conditions are difficult to bring about and schools are related differently to each condition: (a) there must

be opportunities for men to use skills and those opportunities must be clearly visible to the potential workers; (b) there must be a differentiated structure of incentives impelling individuals to prepare for the jobs, and these incentives must be proportioned to the importance of the different kinds of jobs in the development process; (c) schooling or training, in sufficient amount and variety, must be provided to turn out the numbers and kinds of skilled men wanted; d) there must be incentives for employers to provide job-linked training for new workers; (e) the social climate must support these conditions by stimulating people to use their competence in a more than routine mood.

A major deficiency in the usual form of manpower planning is that it is carried out in physical units; often this virtually forces officials to fall back upon coercion to obtain compliance with the plans. Technicians draw up lists of supposed needs for various skills without taking any account of how the prices of skills will affect the numbers who will be employed. An associated omission is failure to compare how workers will be used and what they will produce with the cost of training them. The implicit coercion entailed in implementing such prescriptions may be softened by being concealed behind rationing of places in schools combined with rigid educational specifications for each job. Consequently errors in forecasting are aggravated and waste multiplies. The greater the extent to which diversities in outcomes of training or schooling are taken into account, however, the more flexible will be the adjusting of available skills to actual offers of employment.

If plans for schools are tightly linked to projected estimates of skills wanted, the previously mentioned misapprehension that occupation and kind or level of schooling must be closely linked is encouraged. But if the more prudent assumption is made that in most occupations there is a wide range of schooling, training, and ability, the projections for opening schools will have to be in very broad terms. This allows educational planning to go forward more autonomously, gearing into economic ends more on its own terms.

Planning in terms of specific schedules of needed skills leads to exaggeration of the need for the middle and higher levels of skill. This occurs partly because planning procedures were worked out by men from the advanced nations who have forgotten how crude was the labour force that built their own economies. Virtually never does a manpower plan get formulated in terms of how few individuals

with the scarcer skills the developing country can get along with during the next few decades. No doubt, also, the academic bias of advisers to developing countries fosters inflation in the estimates of high-level manpower needs. Few planners, one suspects, have any realization of how adept employers are in utilizing half-trained men. Gearing plans for schools precisely into estimates of needed skills fosters the very rigidity that would prevent flexible adjustment by workers to changing economic circumstances.

Failure to seek flexibility in plans for training and utilizing men in production is associated with a common propensity to think in terms of goals rather than in terms of the steps by which an economy grows. One protection against this bias is to think first in terms of the services to be performed and then estimating the training that will suffice. For example, if the aim is to reduce illness in the population at the least cost, a country needs many sanitarians and nurses but very few physicians. The aim for a poor country is to maximize the flow of services, not the numbers of highly skilled men.

From the foregoing considerations it is clear that determining the variety and place of training for occupations requires a more subtle analysis than the estimating of the amount of trained competence needed. It is fallacious to argue that because development requires human capital, which requires education, a country must set up numerous technical schools. If the skills are standardized, needed in considerable numbers, and widely used, it is efficient to establish trade schools to train men in them. Similar considerations plus the large admixture of science support the establishment of polytechnical schools for the sub-professional occupations. For the very rare specialities that require extended formal education it is wasteful to provide programmes within a country's universities until development is well along. With comparatively few exceptions that reflect special local circumstances, technical streams or schools on the secondary level have low priority. The more vulnerable such skills are to obsolescence, the more wasteful and inefficient it will be to train for them in schools. (The kind of education most likely to suffer from over-investment in technical schools is that for prospective teachers of science.) For most members of the labour force the function of schools is to make them ready to learn specific vocational skills.

By shifting as much of the direct occupational training as possible to programmes run by employers (including public agencies such

as railways), adjustment of the supply of skills to genuine demands for them is more assured. It is the men who will pay for the skills who judge how many and which kinds of trained men are needed. Moreover, there is an enormous saving on teachers since many of them can be senior workers in firms or government offices. Still another advantage is that training is given to committed workers rather than to potential workers; attrition and unnecessary shifting among occupations is minimized. Not least, this approach to manpower training allows the regular schools to concentrate on what they can do best, and most schools in developing countries have all they can do to teach a simple curriculum. The general rule, then, is: locate vocational training whenever possible near the point of use.

Socio-political constraints on educational planning

Education in many of the developing countries may become an exclusively public service. The merits of this arrangement are not debated here, but there are some implications for educational planning. To be sure, by that arrangement all of the educational system is brought within the jurisdiction of the educational planner. On the other hand, the possibilities of the private schools adjusting for the shortcomings of the public system or filling in the gaps are foreclosed. The flexibility and innovation in schools and other training that played so central a part in western economic development cannot operate freely in most countries today.

In a wholly public educational system, though efforts are made to orient schools toward economic development, political criteria often outweigh economic ones in shaping educational policy. On the one hand, high levels of literacy and luxurious universities may be sought for their prestige value in the international scene—even though less ambition in these spheres would release large resources for other development projects. In countries with widespread suffrage, electoral rivalries may encourage spreading educational resources thinly over apathetic populations as well as in areas eager for schools. Thereby the rewarding linkage between local economic advance and local educational progress is weakened. There may be ethnic favouritism in offering places in schools. Rapid expansion may so lower standards that later stages of schooling are handicapped and stu-

dents in local or overseas universities must spend a year or more in remedial work.

However defensible or desirable some of the political accommodations may be, they undermine the congruence between economic planning and educational planning that supplies much of the rationale for the latter. The task becomes one of manœuvring the available resources so as to minimize political unrest. Attention is turned from planning the educational system to implementing decisions taken on neither educational nor economic grounds. Nor do political considerations yield aims as definite as those derived from economic or educational considerations. We may acquiesce in particular political goals for education, and the planner must always take those into account. But when combined with economic goals for education, it may prove exceedingly difficult to meet the planning criteria of congruence, consistency and continuity.

It is primary education that is relied upon to prepare youth to read newspapers, understand national symbols or the allusions of leaders, and participate in electoral and party work. This unifying effect has always been one of the main outcomes of popular education. By comparison, direct indoctrination in political ideologies has rather minor effects; indeed, indirect political socialization may well be most effective. Unquestionably, national consensus does contribute to a developmental plan but that consensus is probably more certainly produced by the normal curricula than by blunt imposition of political dogmas. Moreover, once national leaders come to view schools as captive audiences for exhortation, they will press for more and more time to be given to it. If the argument that schools form a citizenry more effectively by indirect routes is persuasive, educational planners may be more ready to set forth the view that time used for explicitly political teaching would be better used for science or other pragmatic subjects.

Those nations that have strong local or tribal cultures contending for dominance face an additional political complication. Or there may be the task of starting all pupils off in their vernacular tongue. If emphasis is given to 'localizing' the school lessons rather than to focusing mainly upon the universalistic three R's and other foundations of a technological society, leaders face a dilemma. Commonly the only truly local material is the tribal; yet inclusion of such lore in lessons may subvert the drive for national consensus. Official encouragement of traditional materials (beyond a modest extent in

literature, geography, or history courses) will make it difficult for educational planners to reach any firm estimates of what competence graduates of the schools will have in mathematics, science, or other subjects assumed to prepare for vocational life.

Education is effective, to reiterate, largely to the degree that it leads people to use newspapers, books, advertising, agricultural leaflets, and other forms of print. Hence the common practice of rationing and controlling newspapers (especially the local ones) and discouraging advertising by business firms diminishes the enjoyment individuals receive from their literacy. Most of the infinity of activities that make up development go on within very local settings. To relate himself to the opportunities or demands of development requires that an individual be able to interpret local events he can understand within a wider context. This presupposes local as well as national printed information, explanation, and debate. The alertness that is expected to flow from schooling will not appear if men are expected to act where they live yet to receive information mainly from a centralized press and mostly in a national context. Thereby much of the anticipated pay-off from schooling in terms of practical competence will be lacking; consequently the projections of competence for economic roles upon which the planner was counting will prove wildly exaggerated.

Within the administrative sphere also there are some serious political hindrances to educational planning. Where the overwhelming proportion of educated men are employed in the civil service, their potential contributions to policy are in large part neutralized by the convention of civil service neutrality. Both the emergence of innovation and its conversion into practice become blocked when virtually all decisions must pass through the meandering corridors of government offices. Centralized decisions lengthen the distance of the decision-maker from the circumstances about which decisions must be made. If decisions are taken away from the local habitat of activities, the net contribution to growth processes per secondary or university graduate diminishes. It is not without significance that many more countries provide courses in public administration than in business management—thus, incidentally, increasing their need for expatriate managers.

Hence the projections of correlations between outputs from schools and rates of economic growth will prove disappointing, because so few of the highly trained men have a chance to make autonomous

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decisions regarding the activities on which they have the most intimate knowledge. Within the economic sphere in both free-enterprise and socialist systems, the problem of decentralizing decisions to effectively smaller and more local centres is a challenge.

A vigorous nation needs to have continua of communication throughout its parts rather than a hiatus between citizens and decision-makers. Ideas and information must flow between local and central areas and among local areas. A long chain of intermediary individuals is needed in both public and private spheres; this is the less often mentioned theme in the repeated lament that developing countries cannot find enough middle-level personnel. If these networks of communication are too thin, the anticipated pay-off from an expanding educational system will be less than in societies that spread educated men more evenly among communities and along the hierarchies of communication and control.

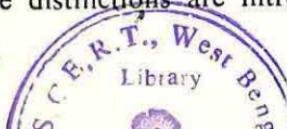
Issues of equity and quality

In order for a society to obtain and operate a modern economy its people must acquire the necessary skills, but the quality of those skills can be ensured by more than one means. As remarked at several places, the readiness of employers to efficiently use and improve their workers is one important means. Maintaining standards in schools is another means; this is discussed at length below. Third, efforts can be made to widen educational opportunities so that progressively larger parts of the population become the recipients of programmes to improve human resources. But this last policy gives rise to bothersome questions, for a country in the earlier stages of development cannot offer schooling impartially to all categories of people and to all localities and at the same time obtain the maximum flow of skills at tolerable levels of cost. We proceed first to explore some of the different and often incompatible conceptions of equity and efficiency in schooling. (When educational planning is brought into the picture we must consider also the question of freedom of choice in education and jobs.)

There are at least four distinct conceptions of equity:

1. Give each child the same amount of schooling. No country seriously follows this policy; where it seems to approximate such a situation qualitative distinctions are introduced.

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2. Give a certain minimum schooling to each child—eliminating the persistent local pockets of complete ignorance—but allow the more responsive areas or families to obtain more schooling.
3. Assure each individual sufficient education to reach his potential for mental development. No country has ever seriously striven for this goal unless it defines 'potential' in traditional academic terms that tacitly exclude most children. All school systems rest on assumptions as to which potentials (and whose) it is most worth while to invest in.
4. Give each child schooling so long as his gain in learning (for given inputs of money or teachers' time) reaches some agreed upon amount. In practice the norm is defined usually in terms of passes on examinations. This is equity among those children possessing the appropriate talent. Those judgements likewise rest on conventional notions of what it is worth while for children to learn in school. There is an alternative criterion that manpower and educational planners are curiously reluctant to use: continue educating children so long as their projected life-production value exceeds (by an agreed amount) the costs of their training. (Much of the cost is for teachers, especially the opportunity costs represented by what those teachers could contribute in a different employment.)

The equity criteria shade into the efficiency ones; thus the first norm listed below is an alternative version of the fourth one above.

1. Admit pupils beginning with those judged to have the greatest potential for learning and proceed to the point at which obtainable resources to support schools are used up. (This implies choosing pupils rather than districts for subsidy.) Some children learn more than others, and the higher skills do not need to be so plentiful as the lower ones. The fourth equity norm above is really an efficiency norm in that ability to learn becomes defined narrowly. Developing countries may be tempted to focus mainly upon that learning which is assumed to be most closely related to productivity. Yet to offer educational opportunities on the basis of talent is no more equitable—however much more efficient it may be for the society—than to allocate opportunities by sex or race.
2. Provide schools mainly or first to those subpopulations or localities from which a given educational investment will evoke the largest response: persistence in school, good marks, and demand for still more schooling. Where there is the most interest in schools,

as we know, the extra-school environment is also most supportive of schools. By favouring the already leading districts or social groups, however, equity norms are violated. Yet this second efficiency norm appeals to planners because public interest in schools varies with the level of economic dynamic in an area.

3. Priority investments in schools should be in the levels and locations where returns in productivity most exceed costs. And such investment should be extended so long as the excess of benefits over costs of schooling equals or exceeds that from alternative investments. Clearly this third efficiency criterion is the most definitely economic. While it is difficult to make accurate application of this criterion, the attempt must be made if educational planning is to be more than a shibboleth. The second efficiency norm is the one most closely linking intra-educational allocation with economic development, but the third one is most useful in setting the total investment for schools.

Questions about freedom of choice arise with any governmental system of education. Free choice among publicly subsidized schools combined with freedom to establish private schools could resolve some of the dilemmas here. But other problems could be aggravated; thus in some developing countries permissive policies on opening schools have multiplied inferior schools beyond justifiable limits. Moreover, a country would still have to face questions of selection for schools by ability, and schooling would be distributed in part by families' willingness and ability to pay for them. (It is uncertain how much different that distribution would be from the existing one in most developing countries.)

Some manpower planners and other writers favour authoritative direction of pupils or students into what are judged to be the priority fields. And surely it is easier to believe that equity has been harmonized with efficiency if assumed manpower requirements are used as the guide, provided one can ignore the fact that many qualified individuals are being rationed out of the kind of schooling they prefer and for which they may be better qualified. Restriction on freedom of choice always has severe reactions upon motivation. Much of the tortuous effort to balance supply with estimated requirements for different kinds of skills could be avoided if heavy investments were made in supplying pupils with abundant information on occupations. What is stipulated here is information, not guidance; the latter requires a large staff of scarce specialized teachers. It

presupposes also that the counsellors are good social psychologists, that they really have reliable knowledge about occupational opportunities, and even that they are able to determine the effects of their actions upon future demand-supply relationships.

Within the context of the considerations being explored in this section, it is important to notice that the prevalent practice of working out educational plans on the national, aggregate level ignores innumerable inequities and inefficiencies within and among the districts of a country. Yet if some kind of harmonization between those two norms is attempted for each district, the over-all national congruence between educational and other plans will be reduced. It was remarked earlier that combining non-economic with economic aims for education in planning eliminates much of the seeming definiteness that appeared to inhere in the manpower forecasts to which school plans were to be adjusted. In the same way, the attempt to harmonize equity with efficiency considerations will produce incongruence. In both examples, part of the maladjustment represents inconsistency between short and long-run plans, but a larger part reflects the impossibility of achieving unambiguous programme specifications when more than one goal on the benefit side is considered. (Only at an advanced state of affluence can a society achieve a reasonably good balance among these opposed goals.)

Considerations of equity versus efficiency are linked in turn with problems about the quality of schools. Until a fairly advanced stage of development, the spread of education through a population increases the gaps in schooling among subpopulations: villages and cities, less and more prosperous districts, upholders of old and of new values, poor and rich. It is often said, in the face of these imparities, that at least the country can make sure that those who graduate from its schools meet satisfactory standards even if few can become graduates. Where the local culture does not appreciate the importance of quality in school performance, policing of minimum standards can be defended. But fidelity to 'high' academic standards can also give rise to serious dilemmas.

Schools are expected both to select pupils for advancement in the system and to allocate them among types of school or curriculum on any given level of the system. Selection may rely in varying mixture upon teachers' estimates, external examinations, ability to pay, or interest. Using the same sorts of indicators, often combined with largely mythical assumptions about 'types of minds', pupils are ad-

judged capable of finishing the grammar stream or as most suitably directed into a vocational or other course. Clearly, selection and allocation are interlinked. And of course the criteria used in either process may vary in validity and reliability.

If the means of selection are very narrow (or bookish), for example, allocation among kinds of schooling must be inefficient since most of the potential range of pupils' capabilities have not come under scrutiny. This consideration is crucial for those who desire that schools prepare youth for other than academic sorts of jobs. Seldom is the validity of these criteria tested by examining the adult vocational success of pupils with different amounts or kinds of schooling. Yet if qualifications for occupations are stipulated narrowly or preponderantly in terms of formal education, the congruence between schooling and anticipated productivity of these individuals in their employment will be lowered. Indeed, to make entry to jobs depend closely on certificates is to put an undue part of the task of both selection and allocation of individuals among adult roles upon the schools. After all, formal schooling is only a moderately good predictor of economic performance apart from the highest and lowest categories of jobs. If educational planning is carried out in terms of definite specifications of school certificates fitted precisely to predicted indexes of productivity for various classes of workers, the very definiteness that is assumed to inhere in educational planning will be frustrated. In countries with too few school places to satisfy existing aspirations, it is also a widespread practice for individuals to take a vocational course, for example, as second choice but to use it to move into a different sort of employment—a very costly way of producing poor clerks.

Thus, basing educational policy or plans preponderantly upon certificates and examination results violates both efficiency and equity norms. The examination marks are commonly very unreliable. Elaborate systems of examinations encourage narrow conceptions of talent and competence. They are mediocre predictors of vocational performance except in very similar kinds of behaviour. The standards they do in fact uphold often have little relevance to the need of developing countries for innovative men or the prime need to improve the utilization of available manpower. Examination systems commonly discourage flexibility and reinforce conservatism. Combined with the planner's penchant for copying Western standards of competence for occupations, formal schooling is usually prolonged beyond necessity.

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It is overlooked often that a high rate of wastage in schools (especially elementary) may be in part the price a country pays for the search process to identify pupils ready and aspiring for further education. An efficient and honest examination system is also costly. If that cost is to be justified and the search process improved, some of the familiar effects of external examination systems have to be combated, though where places are fewer than applicants by a wide margin most of these deleterious effects must be suffered.

Efforts to maintain standards in school systems create tensions among teachers on different levels of the system. Each teacher is supposed to instruct the pupils in certain matters that are useful to all citizens, but at the same time a certain proportion of pupils must be qualified for advancement to the next grade or level. Thus, an elementary teacher may try to use real-life materials to make her classes interesting and to encourage pupils to venture outside the standardized syllabus. Although she has little voice in choosing the pupils who will be accepted into secondary school, she knows that she will be judged by how well her pupils do in the next class or school and in the leaving examination. Naturally she hesitates to depart from the beaten path even if she is so fortunate as to know how to do so. Thus, the mechanism that is set up to validate certificates of competence for graduates operates to narrow and aridify the content of lessons, however broad the syllabus. The multifunctionality latent in schools (spoken of in an earlier section) is attenuated by the efforts to build an orderly school system turning out certified and hopefully standardized graduates.

It may help to see schools against the broader socialization process that works in every society toward both homogenizing individuals and differentiating them from each other. The historic emergence of formal schools has systematized that dual process. Schools diffuse a common culture among the growing generation, but they also identify individuals to be trained for specialized functions. The equity norm is more suited to the homogenizing function of schools, while efficiency norms relate more to creation of specialized persons, though both norms are relevant to each task.

Children's aspirations to persist in school reflect individual appreciation of opportunities to rise above the populace, but continual extension of schooling throughout the population reflects social determination not to allow privileged élites to consolidate their position. Extension of schools into districts displaying little readiness

to use them will lower the correlations between schooling and occupation upon which the planner relies. Strict examination standards and close articulation among levels of schools on the basis of those examinations (i. e., selection) will raise the correlations. Yet, at the same time, a highly selective school system relying upon academic examinations may diminish the total influence of schools upon individuals' lives, and it will diminish the aggregate effect of schools upon economic growth.

Schools as instruments for value reorientation

Only if schools give individuals more than simple skills in literacy and a few rudimentary vocational operations will those individuals be able to participate fully in development. Schools make their largest contribution by widening the horizons of youth, by giving them a capacity to empathize with new human situations, and by preparing them to share in innovative activity. We know all too little about how to bring about these kinds of learning or even how to find out whether schools have done so. The basic developmental changes are not the introduction of steel mills and airlines but the sprouting of thousands of new small enterprises and farms.

The most challenging task is not to introduce one or another sort of school system into a society, though some kind has to be implanted as the base for other changes. The essential task of the educational planner is to root the educational system in a complex matrix of influences making at once for change and also for new kinds of stability-influences related more to appropriate use of trained men than to projecting how many need to be trained. Schools conserve new along with old values; they stabilize new social patterns at the same time as they foster receptivity to change. The planners' task is not to find out what schooling has contributed to growth in some advanced country during the past half century or so but to calculate the pay-off in his own country from the kind of graduates his school system can turn out. He has to figure out what is the change-potential built into the graduates in his country.

Preparing pupils for practical activities has been an issue about which much controversy has swirled in development circles. It is widely assumed that by implanting new values in pupils, particularly by means of some kind of vocational education, the proportion of

educated but untrained graduates can be reduced. This argument is linked often with the contention that a new nation must have a new kind of education, quite different from the one implanted by colonial rulers or a former ruling group. Only brief reflexion is needed, however, to realize that independence supplies no recipe for education. Perhaps, even, with independence a country can more freely copy specifically the kind of education that seemingly brought development to the advanced countries. Understandably, leaders of new nations or of those newly determined to modernize wish to have an educational system adapted to their own customs and aspirations. Indeed, schools are always coloured by the surrounding society, and a school system that is functioning effectively in a society will be localized to its milieu.

But leaders wish also to produce a technological society, and that aim forces them to rely largely upon models created in the more developed societies. Obviously a useful education will be adapted to the society in which it operates. But it does not follow that literary sorts of schooling must be avoided. It is not easier, and no more contributive to development, to teach carpentry than arithmetic; neither is intrinsically the more practical. The economic and social needs of a developing society are numerous and diverse. It profits us little to try to inventory such needs and then deduce the most appropriate kinds of school lessons.

Another misleading slogan is that lessons should deal with objects instead of words. Though objects clearly have priority over words, the most important outcome of schooling is ability to conceptualize and to manipulate symbols. A sounder variant of this position is to call for increased attention to science, as the foundation for modern technology and efficient social organization. Yet science can be taught as bookishly as Latin; when laboratory work consists of demonstrations by a menial assistant, pupils will gain little respect for the pragmatic and experimental aspects of science.

Most arguments about adapting schools to the local society and its needs are fallacious or equivocal. To be sure, if graduates held poorer jobs typically than non-graduates, we would suspect the school system was of little or even negative utility. But the usual situation is the opposite. It is always difficult to decide whether schools are congruent with the society; we are in fact unable to make that judgement about our own Western societies. Schools can undergird a renaissance of local traditions but prepare pupils poorly for participat-

ing in modernizing changes. Those citizens longest in contact with the West may be served well by the schools while the mass of the population are little affected by such schooling as they receive. The 'fitness' of schools can change without any alteration in them because local people come belatedly to appreciate how schools can serve their aspirations.

When one tries to think out what effects schools can exert on pupils' values, the fundamental question is: to what society are schools to be adapted? The ways of life of pupils' parents supply few clues for what should be taught, if technological progress is the aim. The children are being prepared to live in a society that as yet can be found in only a few localities of their nation. Except in the 'growth nodes' of the society, the efforts of schools to give that preparation will receive little support from influences outside the schools. And this means, to return to the planning context, that the productive potential of graduates must be given lower weights than for formally similar graduates in more advanced societies. Yet the individual who finishes university, for example, can in a developing society earn much more relative to a secondary graduate than his counterpart in Europe. The last two statements are not inconsistent.

School officials can legitimately object to being judged preponderantly by how well graduates function in the world of work. For all the reasons given throughout this paper, the efficiency with which graduates are utilized depends mainly upon decisions and operations outside the schools. Moreover, unemployment of graduates may occur because political decisions have overexpanded the schools. Unrealistic wage structures may have been imposed on employers who therefore hire fewer men, or employers may not yet have learned how to use the better labour force that is being made available to them by the slowly improving schools. Graduates may be ineffective also because the peripheral learning that so permeates schools in advanced countries has not yet taken root; this again is a reason for being sceptical of the employment significance of school certificates.

When vocational education is under discussion, there should be as much concern for implanting attitudes of workmanship as in teaching specific skills, for attitudes and motives determine how skills will be used. In planning vocational training on the secondary level, for example, a ministry can choose among policies or combinations of them: (a) schools can be set up to train in specific crafts (tractor-driving or carpentry); (b) schools can focus on teaching

science (including having pupils construct their own apparatus); (c) pupils from the first year in school can be given mechanical toys and science kits (graded to their maturity); learning that is play may be the most effective; (d) various sandwich courses and on-the-job programmes can be encouraged—though these are most useful at post-secondary ages; (e) a few, including the writer, come out strongly for putting large educational investments into provision of information about occupations.

The choices range from turning out men with definite skills ready for employment to relying upon schools to prepare people to receive specific training. The latter alternative expresses a view heard more often from employers than from others; from most employees effective learning for work begins with taking a job. General and vocational education are not substitutes but complements. This leads to policies that encourage flexibility in utilization of men. It also is to say that individuals should postpone occupational choice as late as the society can allow them to remain out of employment. Needless to say, it simplifies the planner's task while making it also less essential, for he is not then obliged to forecast and schedule particular curricula (below a fairly high level of school). He can turn much of the scheduling, forecasting, and training over to employers. The problem becomes as much or more one of inducing employers to hire men and making it worth while for employers to provide training than of central planning of programmes in practical education.

But it is over the appropriate kind of schooling for village children of peasants that the fiercest controversy has raged. There is widespread advocacy for orienting curricula in village schools mainly toward work on the land and increasing respect for farming as a way of life.

However, the percentage of rural children who will be drawn into non-farm jobs varies widely over a country and changes quickly in any given locality. It is wasteful to teach the craft of farming to children who will go to towns; what they need is readiness to absorb other kinds of training. Even those who remain in villages will benefit little from imitating their parents' tillage practices in school gardens; in fact they will be repelled by the drudgery. If it is an improved farming that is to be taught in the village schools—assuming peasant parents would tolerate that 'waste' of time—how will a country find teachers who will know which improved farm practices are suitable for the particular locality to which they happen to be posted?

At the same time, the village teacher—who usually is less well educated or trained than other teachers—must struggle to make sure pupils learn the simple three R's.

It is futile to blame schools for the flow of youth to towns; the accusation was proved groundless in the West decades ago. It is education as such, not particular lessons, that motivates pupils to migrate—assuming that push prevails over pull. One can imagine lessons that hold agriculture in respect, but not to the degree that migration would be restrained. One would like schools to teach respect for physical labour, though no school system and few individual schools in any society succeed in that aim. The function of education in general and the appeal of schooling for individuals is that it supplies an escape from physical labour.

In the political domain, pupils can come to share certain bases of consensus and possibly even certain ideologies; there we are concerned with common values. But in the vocational domain, the individual is concerned with his private and separate career. His success depends upon his capacity to calculate and to decide as an autonomous agent—particularly the majority of individuals who are self-employed. Schools can seldom implant vocational preferences that run counter to opportunities that are visible to the individual. But, once more, this argues for flexible allocation of individuals to training and for planning in broad categories of education and work rather than in terms of specific occupations.

The interrelated problems that have been under discussion in this section must be viewed from within the schools as well. First of all, there is the familiar shortage of qualified teachers—a shortage that will persist into fairly advanced stages of development or even longer. In most countries, few teachers can instruct in more than rudimentary topics of the basic syllabus. With all the handicaps in teaching the core subjects, for schools to attempt also to try to manipulate attitudes would quickly overload the curriculum. The quality of education in most schools will long be so low that all suggested new tasks for the schools must be viewed with reserve.

In the last analysis, individuals are prepared for living in a new and more open and changing society not by indoctrination in values but by learning the skills that will prepare them to continue to learn in the new society.

The social context of education determines its effect

Social scientists who study education differ as to the importance of formal education for social change, and even the same writer takes different positions according to the particular issue. Is schooling, in the short-run and in the long-run, more determined by than determining of the main features of a society? Obviously, until a society has developed over generations an elaborate system of formal education and auxiliary training, together with the other cultural influences of complex societal life, it will not possess a complex technology and a highly productive economy. But development consists of a succession of short-runs. As in walking, it may be education that leads out the first step, or it may be the economy or the polity; at any moment it will be difficult to decide which 'foot' brought the country to its present spot. In sustained development all these factors support each other. The question as to the effect of education is thus circular and really unanswerable.

If one turns this another way, the effect of education on a society depends largely upon the readiness of non-educational institutions to make use of the capacities that schools have implanted in pupils. All adults in an oil-rich country could be secondary graduates, yet be unable to carry out complex production except under guidance of expatriates. In countries without that special natural resource, a high level of average education cannot be achieved unless the population produces most of the resources to support schools step by step along the way. There is not a high correlation between countries' level of schooling and their *per capita* incomes—and the latter may be the prior factor. Skills function only as incorporated in broader patterns of behaviour; whether this behaviour will be learned and used well is only in small part determined by formal education. It follows that it is misleading to try to keep education and economic processes closely in balance; to the extent that this can be accomplished, the adjusting element will seldom be the school.

It is asserted often that peasants' children in developing countries reject farming as an occupation and that sons of manual workers strive single-mindedly for white-collar jobs. Actually, as studies in Africa and elsewhere show, farming ranks among rural youth ahead of many white-collar jobs. If peasants' sons can count on getting some land with capital and credit in localities with good market

opportunities, many will view farming favourably. Yet, if the often-recommended indoctrination of rural pupils actually succeeded, too many would be kept in rural areas and opportunities would be even scarcer than now. At the age when vocational choices are made, moreover, few pupils will be both interested in becoming modern farmers and confident that they succeed in doing so. Where market incentives are expanding, schools can be useful auxiliary influences. Urban youth are no less realistic; however strongly they crave the more attractive jobs, they adjust their expectations to the shifting job markets.

All these considerations set forth in this section constitute a plea for making school systems flexible. Vocational qualifications should not be tied to a particular course of study or certificate. Secondary schools should normally have only a broad differentiation of curricula. General education should predominate heavily on the secondary level—including therein a strong emphasis on science. Pupils should be able to take varied courses and shift easily among curricula. Educational careers should not be determined at a young age nor by one or two tests. There should be more than one academic road to most vocations and diversified linkages between formal schooling and specialized training at work. A fluid society will be fostered by a fluid educational system.

Education has to be linked to the interests that are the stuff of development. Where people are demanding schools—at least where they keep their children in school—we can usually be confident that development is already occurring. Wastage is least in the areas with highest average rates of enrolment. Appreciation of schooling is mainly a reflexion of experienced or directly observed opportunities to use what the school offers in activities that will contribute to development. This is why educational planning needs to be done for local areas as well as for the whole nation, but it is also why planning will be imprecise.

Few Westerners realize how modest was the independent contribution of schools to economic development in their own countries before the most recent decades. Though the network of schools was thin and their quality poor, there were nevertheless many other inducements to accept new ideas and to enter into new kinds of production. There were many living models of success for youth to emulate. The cultural impoverishment in this broader sense in most developing countries (outside the capitals) is difficult to com-

prehend. Even when observed, its importance as a hindrance to development is often underestimated. In frontier United States, for example, there were newspapers; some lawyers, physicians, clergy, teachers; and there were many educated mothers. Often there were libraries, lyceums, workingmen's institutes, and the like. Few developing countries have begun as yet to acquire these for the hinterland communities. In the West, those influences rested on a spreading literacy but they also made literacy functional. Schools under such conditions had to assume only a modest socialization task, for the bulk of the stimuli to change were outside schools.

The concentration of the best-educated men in central cities and in official positions in developing nations reduces the impact of each of them upon the society. There are few vigorous economic, political, and cultural activities in local areas linked in with the élite groups of the capital. Hence the importance of encouraging local newspapers, devolution of economic decisions, and active organs of local government as nourishment for vigour in local life—where most people live. Only when these amenities—as they are so inadequately labelled—have spread, will formal education yield most of its potential benefits. Educational planning is an inevitable feature of complex societies that are attempting to establish a large, diversified, and integrated educational system. The planning may be done by a central government bureau, solely by local officials acting under national legislation, or even by responsible private groups. The purpose of this work has not been to question the utility of educational planning, but rather to question the way it is usually done and to emphasize the importance of many societal factors usually ignored by the planners.

In its conventional form educational planning is linked too intimately with manpower planning; for that and other reasons it takes on a too subordinate place in over-all national policy. To conceive of educational planning as mainly the implementation of forecasts of numbers of men who need to be trained for different occupations is at the same time to overlook other important effects of education and to tie educational programmes to unreliable and often misperceived development priorities. Educational planning is less concerned with ensuring the proper flows of men into occupations than with establishing effective linkages of schools to programmes for the utilization of trained men and to other social forces contributing to modernization.

There will always be a large statistical component in educational planning. But that part of the work should focus on tracing the 'flow dynamics' of pupils and teachers of varying kinds through the educational system. These analyses are fully as complex as manpower forecasts, but they are more pertinent to the crucial decisions that must be made in expanding or shrinking and in articulating different educational programmes. As pointed out often in the preceding pages, many operations that will root schools firmly in their societal milieu are unrelated to or even opposed to most of the considerations dealt with by manpower planners.

This booklet has opposed many popular proposals to add to the work of schools in developing countries made for the laudable purpose of making pupils more practical in their outlooks. In some cases it was contended simply that ill-prepared pupils and teachers could not carry a heavier burden than the core items of the curriculum. In other cases the argument was that the suggested policies would introduce too much rigidity into the educational system. The plea was to allow schools more autonomy. If schools are allowed to concentrate on 'their proper work', they will turn out a more broadly educated generation ready to enter into practical training programmes. This permissive approach is more likely to bring the much-desired 'social' benefits of schools, and at the same time contribute more surely to economic development while not being smothered by narrowly conceived economic demands.

Suggestions for further reading

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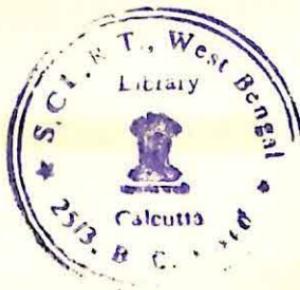
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IIEP book list



The following books, published by Unesco:IIEP, are obtainable from the Institute or from Unesco and its national distributors throughout the world:

Educational cost analysis in action: case studies for planners (1972. Three volumes)

Educational development in Africa (1969. Three volumes, containing eleven African research monographs)

Educational planning: a bibliography (1964)

Educational planning: a directory of training and research institutions (1968)

Educational planning in the USSR (1968)

Financing educational systems (series of monographs: full list available on request)

Fundamentals of educational planning (series of monographs: full list at front of this volume)

Manpower aspects of educational planning (1968)

Methodologies of educational planning for developing countries by J.D. Chesswas (1968)

Monographies africaines (five titles, in French only: list available on request)

New educational media in action: case studies for planners (1967. Three volumes)

The new media: memo to educational planners by W. Schramm, P.H. Coombs, F. Kahner, J. Lyle (1967. A report including analytical conclusions based on the above three volumes of case studies)

Planning the development of universities - I (1971) *II* (1973. Further volumes to appear)

Planning the location of schools (series of monographs: full list available on request)

Population growth and costs of education in developing countries by Ta Ngoc Châu (1972)

Qualitative aspects of educational planning (1969)

Research for educational planning: notes on emergent needs by William J. Platt (1970)

Systems approach to teacher training and curriculum development: the case of developing countries by Taher A. Razik (1972)

The following books, produced in but not published by the Institute, are obtainable through normal bookselling channels:

Education in industrialized countries by R. Poignant
Published by N.V. Martinus Nijhoff, The Hague, 1973

Managing educational costs by Philip H. Coombs and Jacques Hallak
Published by Oxford University Press, New York, London and Toronto, 1972

Quantitative methods of educational planning by Héctor Correa
Published by International Textbook Co., Scranton, Pa., 1969

The world educational crisis: a systems analysis by Philip H. Coombs
Published by Oxford University Press, New York, London and Toronto, 1968

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